

**Summary Report for Individual Task
150-IPO-0010
Plan Deliberate Soldier and Leader Engagement
Status: Approved**

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Destruction Notice: None

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Condition: Given targeting information on a person, or group, commanders intent for engagement and his desired end-state. Some iterations of this task should be performed in MOPP 4.

Standard: Plan deliberate Soldier and leader engagement(s) in accordance with commanders end state to shape the operational environment and enhance civil and military cooperation.

Special Condition: None

Safety Risk: Low

MOPP 4: Sometimes

Task Statements

Cue: The unit Commander has directed a Soldier and Leader Engagement take place with key leaders within his Area of Operations (AO).

DANGER

Leaders have an inherent responsibility to conduct Composite Risk Management to ensure the safety of all Soldiers and promote mission accomplishment.

WARNING

Composite Risk Management is the Army's primary decision-making process to identify hazards, reduce risk, and prevent both accidental and tactical loss. All soldiers have the responsibility to learn and understand the risks associated with this task.

CAUTION

Identifying hazards and controlling risks across the full spectrum of Army functions, operations, and activities is the responsibility of all Soldiers.

Remarks: None

Notes: Deliberate Engagements are anticipated and planned interpersonal interactions that achieve a specified effect or accomplish a specific objective. These engagements may be face-to-face interactions or they may be interactions via other means, such as telephone or video teleconference.

Commanders are the key engagers because their position and authority invest them with the greatest degree of credibility and access to undertake engagements.

Performance Steps

1. Plan a Soldier and Leader Engagement (SLE).

a. Identify intended person (target) or entity (group) to be engaged.

- (1) What is the potential for long-term influence?
- (2) What are the religious, political, familial or tribal relationships, economic standing of the person or group to be engaged?
- (3) What are the person or group's social networks?
- (4) How will the engagement affect these social networks?
- (5) Can the target exercise influence, or make decisions, or take actions, that achieve the commander's objectives?

b. Review all available information.

- (1) Review information from all available sources, such as, combined information overlay (CIO), intelligence preparation of the battlefield (IPB), working groups, targeting folders, open source, and previous engagement reports.
- (2) Review Commander's intent and themes.
- (3) Review other ongoing engagements or negotiations.
- (4) Review recent significant events in the Area of Operations and surrounding areas.

c. Determine other requirements to conduct engagement.

- (1) Who might or should be present?
- (2) Develop information packets on key players.
- (3) Determine which friendly force personnel will be present.
- (4) Who (friendly force) has engaged the target or group before?
- (5) What are the key issues for the command?
- (6) What are the key issues for the local nationals?
- (7) What are the preliminary conditions required to create the desired affect(s)?
- (8) What are the commitments that can be made, if any?
- (9) Identify the best alternative to a negotiated agreement (BATNA) and zone of possible agreements (ZOPA).
- (10) How much time is available to prepare?

d. Identify desired outcomes.

(1) Friendly force desired outcome.

(2) Assumed desired outcome of the other party.

(3) Impact of unintended consequences.

e. Identify and develop measure of effectiveness (MOE), measure of performance (MOP) and indicators for the Soldier and Leader Engagement.

2. Prepare for a Soldier and leader engagement.

a. Develop agenda.

(1) Develop structured messages and discussion points.

(2) Develop contingencies and counters to unfavorable responses.

(3) Refine the best alternative to a negotiated agreement (BATNA) and zone of possible agreements (ZOPA).

Note: Best alternative to a negotiated agreement (BATNA) is the course of action that will be taken by a party if the current negotiations fail and an agreement cannot be reached. It is used as a point of leverage.

b. Determine roles and responsibilities within the team.

(1) Determine who will conduct the engagement.

(2) Designate a recorder or note taker (someone not conducting the engagement).

(3) Select the security leader.

(4) Select an interpreter (someone you trust).

(5) Designate a observer/photographer.

Note: One techniques is to have an interpreter take pictures to avoid the perception of intelligence gathering.

c. Determine the setting for the Soldier and leader engagement.

Note: If the engagement is about a serious matter and important decisions will be made, a conference room is appropriate. If the intent of the meeting is to build rapport, an office or social setting may be more appropriate.

(1) Hosting the Engagement.

(a) Select a location to support the tone of the meeting.

(b) Select a facility that is professional in appearance.

(c) Sanitize the engagement location.

Note: Ensure no information is visible that may be useful to the threat.

(d) Select a location that is easily secured.

(e) Rehearse picking up the person or group at the entrance to the facility.

(f) Ensure security personnel have situational awareness of the event.

(g) Consider protocol (pair people of equal rank or status).

(h) Provide hospitality (social customs, refreshments).

(i) Walk through all security procedures.

(2) SLE conducted at a neutral location.

(a) Perform reconnaissance at the location using multiple means (if feasible).

(b) Balance the security posture with consideration for the host.

Note: Do not become complacent; you are responsible for your parties security.

(c) Implement security considerations.

(d) Establish protocol.

(e) Create an exfiltration plan.

(f) Design a communications plan.

d. Conduct rehearsal.

(1) Have all personnel who will be present attend the rehearsal.

(2) Train to conduct deliberate and dynamic engagements.

(3) Rehearse with the interpreter; discuss the desired effects.

(4) Rehearse with the recorder/note taker.

(5) Use interpreters to role play local national personalities, if possible.

(6) Practice social nuances.

Cue: The Information Operations Officer is designated to conduct the engagement.

Remarks: The Information Operations Officer is a planner and not normally the person that engages the person or group.

3. Assist in the execution of the Soldier and leader engagement (if required).

Note: Execute the engagement

- (1) Begin the meeting:
 - (a) Use correct social customs.
 - (b) Greet in culturally appropriate hierarchy (e.g., greet elders first).
 - (c) Allow for social time, if required, prior to the meeting.
 - (d) Present small gifts, if acceptable.
 - (2) Conduct the meeting:
 - (a) Use appropriate cultural behavior.
 - (b) Be patient and a good listener.
 - (c) Know when to speak.
 - (d) Focus on the objective.
 - (e) Promise to consider. Do not promise to take action.
 - (3) Close the meeting:
 - (a) Repeat the actionable items; restate understandings.
 - (b) Clarify agreements, if needed.
 - (c) Establish follow up timeline.
 - (4) Depart.
 - (a) Give appropriate farewells.
 - (b) Arrange for a next meeting and solidify in follow up.
 - (5) Recorder/note taker:
 - (a) Position the recorder/note taker where the person conducting the engagement can see him or her.
 - (b) Establish leader/interpreter/recorder signals (e.g., tap on arm to stop talking).
 - (c) Use audio recording, if acceptable.
 - (d) Only take notes if acceptable. Ask first: "I'm going to take some notes, is that okay?"
 - (6) Use of interpreters:
 - (a) Place the interpreter behind or to the side of the person conducting the engagement.
 - (b) Have secondary interpreters available to:
 - Pick-up on sidebar conversations.
 - Conduct multiple simultaneous engagements.
- a. Avoid making promises that cannot be kept.
- b. Use open-ended questions to facilitate discussion.
- c. Address all talking points relevant to the engagement.
- d. Focus on avoiding or overcoming impasses and working towards the anticipated Zone of Possible Agreement (ZOPA).
- e. Have a planned signal with others for any situation where the spokesperson may need to break from the engagement.
4. Conduct post engagement information collection.
- a. Review what has been agreed upon and clarify expected actions by both parties.
 - b. Review outstanding issues captured during the engagement.
 - c. Forward information gathered during engagement for analysis and dissemination.
 - d. Record information for continuity (Make sure to have photos and cell phone numbers of key individuals).
 - e. Report acquired information to higher headquarters using established procedures.
 - f. Conduct follow-up.
 - (1) Follow through with agreements made.

Note: This is a very important step in the process.
 - (2) Evaluate next steps.

(3) Disseminate information.

(4) Update target folders.

(5) Reengage if necessary.

5. Assess post engagement information.

a. Continuously assess the reactions and vulnerabilities of the person or group that was engaged.

b. Monitor the situation and progress of the operation's movement towards the commander's end state.

c. Evaluate the engagement against indicators, Measure of Effectiveness (MOE) and Measure of Performance (MOP).

(Asterisks indicates a leader performance step.)

Evaluation Guidance: The Soldier is a planner for the Soldier and leader engagement. The soldier must complete all steps except step 3 execution (unless he is designated as the lead for conducting the engagement).

Evaluation Preparation: Provide target folders on the key person or persons (group) that the commander wants to engage. Provide commanders guidance and intent for the Soldier and leader engagement. Provide the soldier information on past engagements. Let the Soldier know if he is to be the lead for the engagement.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Planned the Deliberate Soldier and Leader Engagement (SLE).			
a. Person or group identified.			
(1) Potential for long-term influence has been identified.			
(2) The individual or group affiliations and dynamics have been identified.			
(3) The individual or group social networks have been identified.			
(4) What is the affect of the engagement on the identified social networks.			
b. All available information that relates to the engagement has been reviewed.			
c. Other requirements to conduct the engagement have been identified.			
d. Identified and developed Measure of Effectiveness (MOE), Measure of Performance (MOP) and indicators.			
2. Prepared for a Deliberate Soldier and leader engagement.			
a. Developed agenda and negotiation criteria.			
b. Roles and responsibilities of team members were identified.			
c. The appropriate setting the the Soldier and leader engagement has been determined.			
d. Rehearsal conducted.			
3. Assisted in the execution of the Deliberate Soldier and leader engagement (If required).			
4. Conducted after-action-review of Soldier and leader engagement to capture releavent information.			
5. Assessed post engagement information.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	ADRP 3-0	Unified Land Operations	No	No
	ADRP 5-0	The Operations Process	No	No
	ATP 3-07.40	ENGAGEMENT TEAMS MULTI-SERVICE TACTICS, TECHNIQUES, AND PROCEDURES FOR CONDUCTING ENGAGEMENTS AND EMPLOYING ENGAGEMENT TEAMS	No	No
	FM 3-13	Inform and Influence Activities	Yes	Yes
	FM 6-0	COMMANDER AND STAFF ORGANIZATION AND OPERATIONS	No	No
	JP 3-13	Information Operations	No	No

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT. Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

Prerequisite Individual Tasks :

Task Number	Title	Proponent	Status
150-IPO-0009	Produce a Combined Information Overlay	150 - Combined Arms (Individual)	Approved
150-IPO-0003	Integrate Information Operations (synchronized IRC) into the Military Decision Making Process.	150 - Combined Arms (Individual)	Approved

Supporting Individual Tasks :

Task Number	Title	Proponent	Status
150-IPO-0006	Develop Information Requirements for Information Operations	150 - Combined Arms (Individual)	Approved

Supported Individual Tasks :

Task Number	Title	Proponent	Status
150-IIA-1001	Analyze Non-Adversarial Threats and Opportunities in the Information Environment (IE)	150 - Combined Arms (Individual)	Superseded

Supported Collective Tasks :

Task Number	Title	Proponent	Status
71-8-7339	Coordinate Support to Education Programs (Battalion – Corps)	71 - Combined Arms (Collective)	Approved
71-8-7327	Provide Support to Human Rights Initiatives (Brigade - Corps)	71 - Combined Arms (Collective)	Approved
71-8-7325	Conduct Property and Dispute Resolution Processes (Brigade - Corps)	71 - Combined Arms (Collective)	Approved

71-8-5311	Conduct Soldier and Leader Engagement (Brigade - Corps)	71 - Combined Arms (Collective)	Approved
71-9-5610	Integrate Information Operations (Division Echelon and Above [Operational])	71 - Combined Arms (Collective)	Approved
71-8-7643	Plan Counterinsurgency Operations (Brigade - Corps)	71 - Combined Arms (Collective)	Approved
71-8-7328	Provide Support for War Crimes Courts and Tribunals (Brigade - Corps)	71 - Combined Arms (Collective)	Approved
71-8-7350	Coordinate Public Sector Investment Programs (Battalion – Corps)	71 - Combined Arms (Collective)	Approved